

ComReg publishes results of Irish mobile phone user experiences and perceptions national survey

ComReg 17/100

Overview

The Commission for Communications Regulation (ComReg) today published the results of a survey, the first of its kind in Ireland, investigating Irish people's experience and perceptions of their mobile phone service. The survey, conducted by Behaviour & Attitudes and The Research Perspective on behalf of ComReg, involved over 2,800 face-to-face interviews.

To ensure that the experiences of those in rural areas were captured, the survey sampled a higher percentage of those living in less densely populated parts of the country. As Gerry Fahy, Chairperson of ComReg, explained, *"we surveyed one in every 100 residents in the most rural parts of the country. This methodology allowed us to put a magnifying glass on rural areas where ComReg is aware that service issues may be more common."*

In relation to usage trends:

- The survey confirmed that mobile phones are increasingly used for much more than making and receiving calls and messages – they are now portals into the digital world.
- While voice and text are still the most popular services on mobile phones, three quarters of people also use data, with browsing the internet, using social media, streaming music and TV applications the most common online activities.
- The take-up of data services is lower in rural areas, and the use of messaging applications such as WhatsApp is also more prevalent in urban parts of the country.
- The most frequent place to use a mobile phone for making or receiving calls or SMS messages is in the home.

Mr Fahy also said that *"mobile phones are now personal communications devices, and are increasingly the device of choice, even at home. Our expectations of, and reliance upon, mobile phone coverage has increased significantly."*

In relation to consumers' experience of mobile phones, the survey found that:

- Most consumers across the country indicated satisfaction with their current mobile service. However, 29% of respondents experience service issues for calls or SMS throughout their home. This number rises to 43% percent in the most rural areas.
- Specific issues include the quality of service deteriorating when indoors, a deterioration in the quality of reception during a call, the inability to make calls and calls being dropped.
- Consumers are generally slow to change operator. However, many of those who do switch report coverage improvements. This is particularly the case in rural areas.

Mr Fahy stated that *"ComReg recommends that consumers keep an eye on the market and be prepared to switch operator for a service that better meets their coverage and service requirements. In particular, we direct consumers to our newly updated compare tool on www.comreg.ie/compare."*

Mr Fahy went on to say that ComReg is a participant in the Mobile Phone and Broadband Taskforce and is committed to implementing a number of projects which are designed to improve the service experience of mobile phone users.

In particular, two key documents are expected to be published over the coming weeks:

- A consultation on the use of mobile phone repeaters, which can help enhance mobile phone signals indoors but are currently not permitted for use in Ireland.
- The results of tests on the voice call performance of mobile handsets currently on the market. These results will improve the ability of consumers to make informed decisions when choosing a mobile device.

In addition:

- ComReg is in the process of developing a “coverage tool” to help mobile phone users understand where in the country they should expect to get coverage, depending on their service provider and other factors.
- ComReg has requested that Industry publish answers to a set of frequently asked consumer questions (FAQs) developed by ComReg about handset ownership, unlocking and costs. These FAQs will greatly improve consumers’ information when purchasing handsets.
- In June 2017, ComReg published its Decision on new minimum requirements for Service Providers’ Codes of Practice for complaint handling. Service Providers must implement these by 1 January 2018, and the new measures will greatly assist consumers (including businesses) if they need to complain to their service provider.

The key findings of the survey are summarised below, and the full report (ComReg Document No. 17/100a) can be found on ComReg’s website at www.comreg.ie/publications.

Consumer information is available at www.comreg.ie/consumer-information. ComReg’s value comparison calculator is available at on www.comreg.ie/compare.

Key Survey Findings

The key findings from the report are as follows:

Mobile phones are increasingly important parts of our everyday lives, and mobile phone ownership has become almost ubiquitous in Ireland. We use our phones in more ways than ever before and our expectations of what they can do has increased.

- 98% of those surveyed indicated that they owned a mobile phone, including 92% of those over the age of 65.
- 83% of those surveyed indicated that they owned a smartphone, including 98% of those between the ages of 16 and 24, and 49% of those aged over 65.
- According to the survey, the most popular handsets in Ireland are Apple iPhones and Samsung phones.

Although the survey found that most consumers are satisfied with their mobile phone service, a range of issues were identified, especially by those living in rural areas. The study found that a higher percentage of those living in rural areas experience issues than those in more urban parts of the country. Some consumers also find that the quality of their service deteriorates when indoors.

- The majority of those surveyed indicated that they were satisfied with their mobile phone network coverage at home (77%), compared to 11% who were dissatisfied.

Respondents living in urban areas were more likely to report satisfaction (82%) than those living in very rural areas (62%).

- However, respondents from all parts of the country indicated that they experienced service issues at some point, with a higher frequency of issues in rural areas.
- Nationally, 30% of those surveyed experienced service issues at least once in the past month with 3G/4G data throughout their home. 51% of those with service issues in their home experience them on a daily basis.
- Of those who experienced loss of signal throughout their entire home for voice or data during the previous month, the most common service issues experienced were a deterioration in the quality of reception (51%), inability to make a call (38%) and calls being dropped (34%).
- One quarter of those surveyed considered that their mobile phone coverage experience had improved over the previous 12 months, compared to 10% who felt that it had deteriorated.

A range of issues can affect the quality of mobile phone service, including the handset itself and signal coverage. Switching either their handset or provider may improve the experience of some consumers.

- 10% of those surveyed switched their mobile phone handset due to coverage or signal problems. Of these, 55% found that switching improved their coverage experience, compared to 4% who found that their service deteriorated.
- 24% of those surveyed have switched mobile phone network. 48% of those who switched mobile phone network, but kept their handset, found it improved their mobile coverage experience, compared to 3% who indicated that their coverage experience deteriorated. Half of those who switched both handset and mobile phone network found that it improved their mobile coverage experience, compared to 2% who indicated that their experience deteriorated. These beneficial effects were more strongly reported in rural areas.
- With regard to internet access, 44% of smartphone owners reported that using a Wi-Fi service instead of a 3G/4G service improved their browsing experience, compared to 3% who said that this made experience worse.

While most consumers are satisfied with the quality of their service, those living in rural areas were more likely to indicate dissatisfaction. In an attempt to understand the importance of a high quality service, respondents were asked to indicate how much they would value an improvement, and how willing they would be to switch to a hypothetical network.

- 21% of those surveyed indicated that they would be willing to switch to a network that offered a reliable mobile phone service if their monthly price remained the same.
- 12% of those surveyed indicated that they would be willing to pay an additional amount each month to receive a reliable mobile phone service, compared to 71% who said that they were not prepared to pay anything extra.
- Of those who were willing to pay an extra amount per month for a reliable mobile phone service throughout their home, the average additional amount was €1.98 for 3G/4G data and €2.17 for voice and SMS services.

The most frequent place to use a mobile phone for sending or receiving calls or SMS messages is in the home. However, by their nature, mobile phones are used in a range of locations, and the pattern of usage varies by location.

- The most common place to use a mobile phone is in the home; 69% of those surveyed used their mobile phone at home on a daily basis for calls or SMS. 38% of those surveyed indicated that they used their mobile phone on a daily basis for calls or SMS when outside the home or away from their home. 15% of those surveyed used their mobile phone on a daily basis for calls or SMS when travelling in a car or bus.
- Inside the home is also the most common place to use a mobile phone for 3G/4G data. 45% of those surveyed used their mobile phone at home on a daily basis for 3G/4G data. 31% of those surveyed indicated that they used their mobile phone on a daily basis for 3G/4G data when away from their home. 12% of those surveyed used their mobile phone on a daily basis for 3G/4G data when travelling in a car or bus.

Handsets are used for much more than to communicate via calls and texts. Survey respondents primarily use 3G/4G data to browse the internet and to access Over the Top (OTT) services such as social media and instant messaging.

- According to the survey, three quarters of smartphone owners use 3G or 4G data on their mobile handset, with this number lower in more rural areas. 93% of smartphone users under the age of 35 use 3G/4G data, while 36% of those surveyed who are over the age of 65 indicated that they use 3G/4G data.
- Making and receiving voice calls on a mobile phone remains important – on average those surveyed indicated they spend 30 minutes a day on voice calls.
- Browsing the internet was the most common use of a smartphone (44 minutes/day), followed by accessing social media (average 35 minutes/day).
- Instant Messaging applications (e.g. WhatsApp, iMessage, Facebook Messenger, Snapchat, etc) are important features for smartphone users. Those surveyed send or receive an average of 20 instant messages per day, with this figure higher in urban areas. Traditional SMS text messages also remain an important use of mobile phones – on average those surveyed send or receive 15 messages a day.

ComReg is the statutory body responsible for the regulation of the telecommunications sector. One of our core responsibilities is the protection of consumers. ComReg provides consumer guides and a comparative pricing website, and implements a consumer care function on behalf of all consumers of electronic communications and services (further information is available at www.comreg.ie).

- 12% of those surveyed have complained to their mobile phone operator about service issues, with this number higher in more rural areas. These complaints mostly related to calls being dropped or an inability to get a 3G/4G service in their home.
- 34% of respondents were aware of ComReg and 4% of these respondents had made a complaint to ComReg regarding coverage or quality of service.

[Annex 1: Survey Sample Construction](#)

This survey investigates Irish people's experience and perceptions of their mobile phone service. The survey, conducted in the summer of 2017 and prepared by Behaviour & Attitudes and The Research Perspective on behalf of ComReg, involved over 2,800 face-to-face interviews.

In order to ensure that the results of this survey captured the experiences and perceptions of mobile phone users across all parts of the country, a multi-cohort sampling design was adopted. Under this methodology, the country was divided into five cohorts based on population density, and representative samples were taken from each of these areas. This survey methodology allows for rural areas to be overrepresented meaning that rural and urban areas can be examined separately in a statistically meaningful way. This provides for

an insight into more rural parts of the country where service issues tend to be most prevalent, and allows for the discussion and analysis of rural issues to be more robust and powerful. The total sample can be reweighted to give a nationally representative picture.

Information on population density was supplied by the Central Statistics Office (CSO).

In total, 2,826 consumers were interviewed across all counties in Ireland. The five cohorts were defined as follows, going from most urban to most rural. Note that the population density of the State is 70 persons per sq/km.

- **Sample 1:**
 - 500 people sampled
 - Population density greater than 100 persons per sq/km.
 - 2.9 million people in Ireland live in this area
- **Sample 2:**
 - 500 people sampled
 - Population density of between 50 and 100 persons per sq/km.
 - 500,000 people in Ireland live in this area.
- **Sample 3:**
 - 600 people sampled
 - Population density of between 25 and 50 persons per sq/km.
 - 650,000 people in Ireland live in this area.
- **Sample 4:**
 - 700 people sampled
 - Population density of between 10 and 25 persons per sq/km.
 - 475,000 people in Ireland live in this area.
- **Sample 5:**
 - 500 people living in areas with a
 - Population density of less than 10 persons per sq/km.
 - 55,000 people in Ireland live in this area.